

Table of contents

- [About](#)
- [Discarding vs Deleting: What's the Difference?](#)
- [Discard When...](#)
- [Delete When...](#)
- [Discarding](#)
- [Discarding a Small Number of Items](#)
- [Discarding a Large Number of Items](#)
- [Deleting](#)
- [Deleting Using Call Number and Item Maintenance](#)
- [Deleting Using Delete Title, Call Numbers or Items](#)
- [Video Tutorial](#)
- [Discarding vs Deleting Records](#)

About

This article and video tutorial (below) cover the difference between discarding and deleting, when to discard, when to delete, and how to do either process.

Discarding vs Deleting: What's the Difference?

Discarding an item will ensure that your library's **OCLC holdings are updated**, which means you won't receive ILL requests for items you no longer have. MSC system administrators remove these items from the system on the first business day of the month, then they send the list of successfully discarded items to OCLC for updating. Finally, they email the msc-discuss listserv with a **count of discarded items by library**, as well as a list of items that didn't discard, aka **problem discards**.



For information on problem discard items, see [Cataloging - Problem Discards](#).

Deleting an item **doesn't update** your library's OCLC holdings; however, there are instances when you may want to delete instead of discard.

Discard When...

1. The item you're removing is your **library's last copy on that bibliographic record**, which means you need the change to be reflected in OCLC.
2. Your **replacement for the last copy doesn't match the bib record** the original item was attached to, e.g. the replacement audiobook has a different narrator, is expanded or abridged, etc. You should attach the replacement to the correct bib record and discard the old copy to update your OCLC holdings.
3. **You're not sure** if you should discard or delete.

Delete When...

1. You want to remove an **extra copy** of an item from your library's holdings on a bib record. For example, if you have two or more copies of an item and, after removing a copy / copies, **you'll still have at least one**, you can use delete. This is because your library's **OCLC information isn't changing** (you still have an item available for ILL), so it doesn't need to be updated.
2. Your **replacement for the last copy still matches the bib record** the original item was attached to, e.g. the replacement audiobook has the same narrator, is the same length, etc. Once you've received your replacement and added it as a copy to the bib record, you can delete the old copy.
3. You want to remove a **brief / local record** that was never submitted to OCLC, e.g. ILL dummy records, seed library items, tools, cake pans, etc.

Discarding

You can discard items in the **Call Number and Item Maintenance** wizard or in the **Global Item Modification** wizard. If you only have one or two items you need to discard, Call Number and Item Maintenance works well. If you have a cart full of items to discard, Global Item Modification works best.

Discarding a Small Number of Items

1. Check to see if the item:
 - Has holds
 - Is checked out to a patron
 - Was marked lost
2. If the item meets any of these criteria, refer to [Cataloging - Problem Discards](#) to resolve the issue.
3. Open the **Call Number and Item Maintenance** wizard (Cataloging module > Common Tasks toolbar > Call Number...).
4. Look up the item you want to discard.
 - a. If you have the item in hand:
 - i. Select **Item ID** from the **Index** drop-down.
 - ii. Scan the item barcode.
 - b. If you don't have the item in hand:
 - . You can look it up in Enterprise and copy the item ID from there.
 - i. You can do a search in WorkFlows.



For information on searching, see [Enterprise - Searching Guide](#) or [Cataloging - Searching Guide](#).

5. Click the **Call Number/Item** tab.

Call Number and Item Maintenance

The original road kill cookbook ⁵ Peterson, B. R.

Control Bibliographic **Call Number/Item** Bound-with

The original road kill cookbook - Peterson, B. R.

- MTSC
 - 818.54 PETE 1987 - MTSC
 - 193469-3001 - 1 - BOOK - NON-FICT** ⁶
 - Missoula Public Library and Branches
 - 818.5402 PETERSO - MSLA-MAIN
 - 33144001102539 - 2 - 28DAY - STACKS

Item Info Holds

Call number information

Call number: 818.54 PETE 1987 Class scheme: DEWEY

Call library: MTSC Shelving key: 818.54 PETE 1987

☐ Shadow call number

Item information

Item ID: 193469-3001 Copy number: 1

Type: BOOK Item library: MTSC

Home location: **S** DISCARD Current location: NON-FICT ⁷

Item cat1: BOOK Item cat2: ADULT

Item cat3: Item cat4:

Item cat5: Number of pieces: 1

Media desk: Price: \$20.00

Total charges: 0 ☒ Circulate

☒ Permanent ☐ Shadow item

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	KM TEST

Date created: 2/25/2020
 Date last charged: Never
 Date due: none
 Last discharged: Never
 Date inventoried: Never
 Times inventoried: 0
 Previous user ID:
 Last activity: Never
 In-house uses: 0

⁸ Return to Search **Save** Add Call Number Add Item Delete(x) Close

6. Click the **item ID** you want to discard so that it's highlighted.

7. Change the **Home location** to **DISCARD**. A red **S** will appear, signifying that the item will be **shadowed**. This means patrons won't be able to see the item in Enterprise and staff won't be able to see it during a browse search in WorkFlows.

8. Click **Save**.



The item will remain in the system until the **first of the month** when the **monthly discard report** is run. Once the report runs, the discarded item will disappear from the system and cannot be retrieved.

Discarding a Large Number of Items

If you don't have time to perform steps 1-2 for each item at the beginning of this process (not unusual when discarding items in bulk), simply be prepared to do them later if any items show up on the monthly problem discards report.

1. Check to see if the item:

- Has holds
- Is checked out to a patron
- Was marked lost

2. if the item meets any of these criteria, refer to [Cataloging - Problem Discards](#) to resolve the issue.

3. Open the **Global Item Modification** wizard (Cataloging module > Item Maintenance toolbar > Global Item...).

4. Select **DISCARD** from the **Home location** drop-down. This is the only drop-down you need to change.

The screenshot shows the 'Global Item Modification' wizard interface. On the left, there is a sidebar with a 'Common Tasks' section containing icons for 'Call Number and It...', 'Label Designer', 'SmartPort', 'Item Search', 'Check Item Status', 'Help', and 'Print'. Below this is a 'Title Maintenance' section and an 'Item Maintenance' section. In the 'Item Maintenance' section, the 'Global Item Modifi...' button is highlighted with an orange box. The main window of the wizard is titled 'Global Item Modification' and contains a form with various fields. The 'Home location' dropdown menu is highlighted with an orange box and is set to 'DISCARD'. Other fields include 'Item ID:', 'Item type:', 'Item category 1:', 'Item category 2:', 'Item category 3:', 'Item category 4:', 'Item category 5:', 'Item library:', 'Shadowed:', 'Permanent:', 'Circulate:', and 'Price:'. Most of these fields are set to '»Will not be modified'.

5. Scan your items. They'll display in a list in the middle of the screen.

Global Item Modification x

Global Item Modification

Item ID: 2138680-4001

Item Values to Modify

Item type: »Will not be modified Home location: DISCARD Item category 1: »Will not be modified

Item category 2: »Will not be modified Item category 3: »Will not be modified Item category 4: »Will not be modified

Item category 5: »Will not be modified Item library: »Will not be modified Shadowed: »Will not be modified

Permanent: »Will not be modified Circulate: »Will not be modified Price: \$

Title	Author	Call number	Copy	Item ID
The Immortal Irishman : the Iris...	Egan, Timothy, author.	KIT BIO MEAG 2016	1	2405975-8001
Sharknado [videorecording (DV...	Latt, David Michael, 1966-	DVD SHAR	1	2136726-7001
Sharknado 2 : the second one	Fox, Vivica A., 1964-	DVD SHAR #2	1	2216542-3001
Krampus	Tull, Thomas,	DVD KRAM	1	2322695-10001
Lake Placid [videorecording]	Miner, Steve, 1951-	DVD LAKE	1	2242586-2001
Lake Placid 2 [videorecording (D...	Leachman, Cloris.	DVD LAKE #2	1	2138679-3001
Lake placid 3 [videorecording (D...	Reed, David.	DVD LAKE #3	1	2138680-4001

Item type: DVD
Home location: DVD-FIC Modified to: DISCARD
Item category 1: DVD
Item category 2: ADULT
Item category 3:
Item category 4:
Item category 5:
Item library: MTSC
Shadowed: N
Permanent: Yes
Circulate: Yes
Price: \$20.00

If you click on one of the discarded items in the list, you'll see the **Home location** has automatically been modified to **DISCARD**.

Deleting

You can delete items in the **Call Number and Item Maintenance** wizard or in the **Delete Title, Call Numbers or Items** wizard. The Call Number and Item Maintenance allows you to delete call numbers and items, while the Delete Title, Call Numbers or Items wizard allows you to delete title/bib records as well.

Deleting Using Call Number and Item Maintenance

1. Check to see if the item:
 - Has holds
 - Is checked out to a patron
 - Was marked lost
2. if the item meets any of these criteria, refer to [Cataloging - Problem Discards](#) to resolve the issue.



If your library's **OCLC holdings** will be incorrect once you delete, e.g. you delete your library's last copy of something but it will still show as available for ILL in OCLC, then you need to **discard** the item instead.

3. Open the **Call Number and Item Maintenance** wizard (Cataloging module > Common Tasks toolbar > Call Number...).

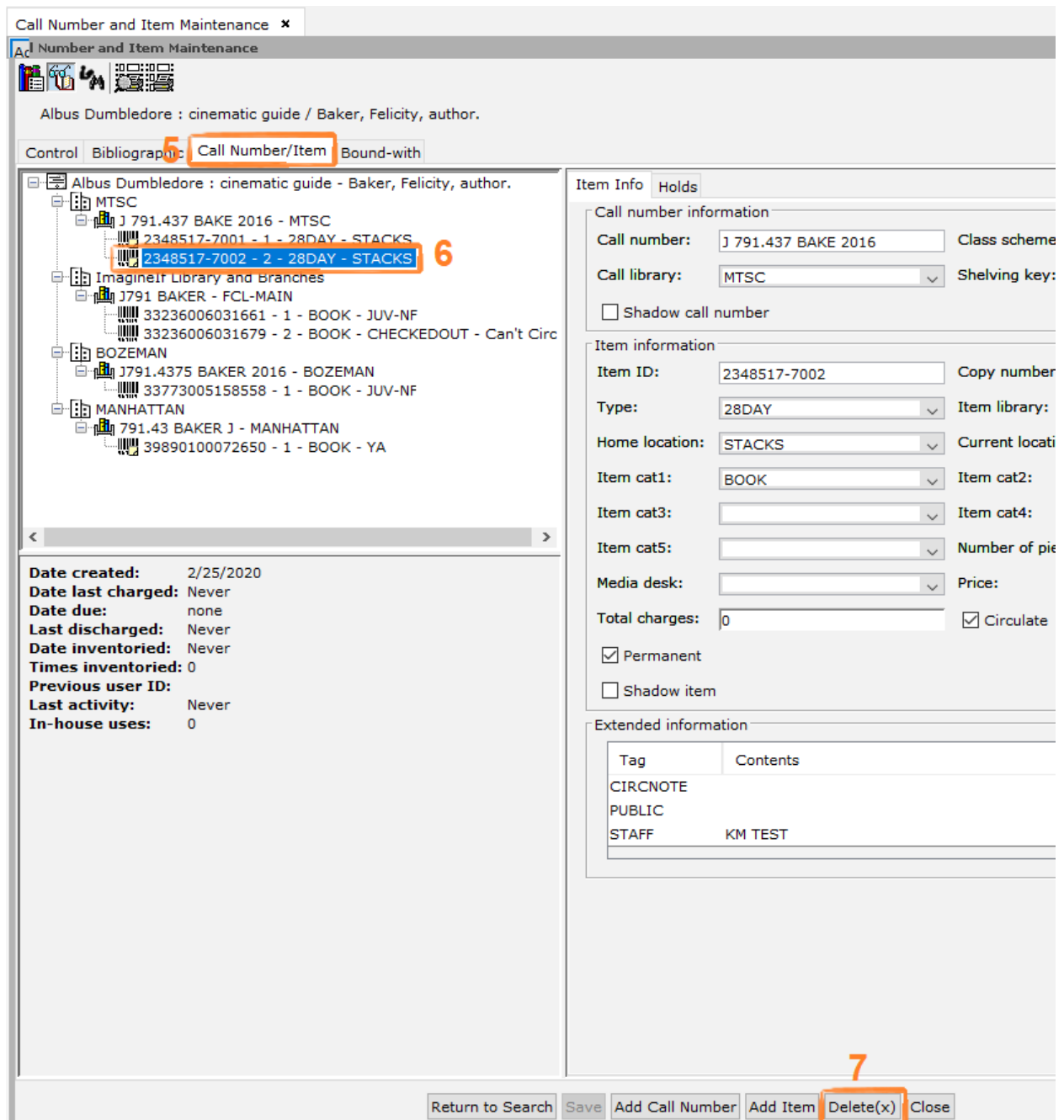
4. Look up the item / call number you want to delete.

- a. If you have the item in hand:
 - i. Select **Item ID** from the **Index** drop-down.
 - ii. Scan the item barcode.
- b. If you don't have the item in hand:
 - . You can look it up in Enterprise and copy the item ID from there.
 - i. You can do a search in WorkFlows.



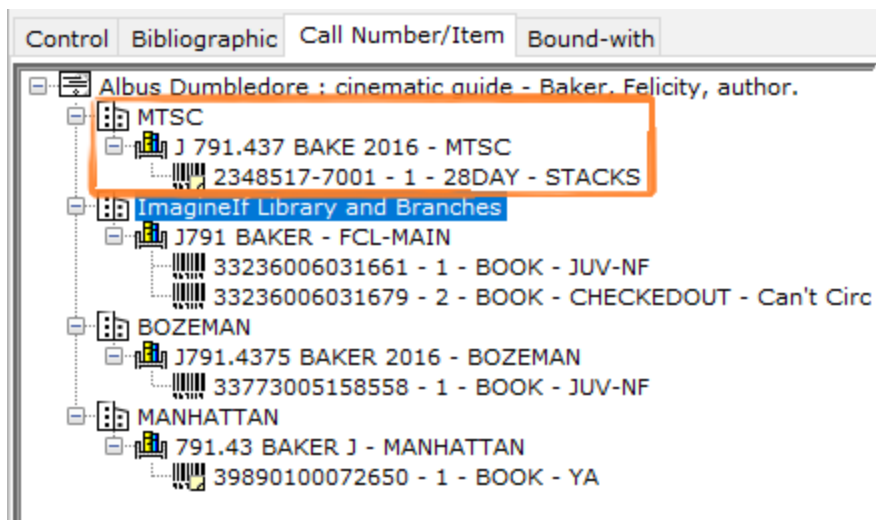
For information on searching, see [Enterprise - Searching Guide](#) or [Cataloging - Searching Guide](#).

5. Click the **Call Number/Item** tab.



6. Click the **item ID** or **call number** you want to delete so that it's highlighted.

7. Click **Delete(x)**. You'll see in the screenshot below that the second copy is gone, leaving only the first copy.



The item will immediately be removed from the system and cannot be retrieved.

Deleting Using Delete Title, Call Numbers or Items

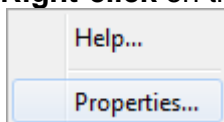
1. Check to see if the item:
 - Has holds
 - Is checked out to a patron
 - Was marked lost
2. if the item meets any of these criteria, refer to [Cataloging - Problem Discards](#) to resolve the issue.



If your library's **OCLC holdings** will be incorrect once you delete, e.g. you delete your library's last copy of something but it will still show as available for ILL in OCLC, then you need to **discard** the item instead.

3. Double-check your wizard properties **so you're less likely to delete another library's items:**

- a. Close the wizard if it's open already.
- b. **Right-click** on the wizard and select **Properties...**



- c. On the **Behavior** tab, check all the boxes in the **Select Behavior** section.

WF Delete Title, Call Numbers or Items : Set Properties

Display property page: ☐ Wizard Startup ☒ Never

Behavior Defaults Helpers

Search library preferences

Search library list type: ☒ Search by library
☐ Search by search library group
☐ Search by library or search library group

Search library list: ALL

Select Behavior

- ☒ Delete title when deleting last call number or last item
 - ☒ Prompt for confirmation before deleting title
- ☒ Delete only items for search library
- ☒ Delete items with a charge history record
- ☒ Prompt before deleting items with bills

OK Cancel

d. On the Defaults tab, choose **EXACT** for Type, **Item ID** for Index and **your individual library** from the library drop-down.

WF Delete Title, Call Numbers or Items : Set Properties

Display property page: ☐ Wizard Startup ☒ Never

Behavior **Defaults** Helpers

Search preferences

Type: EXACT

Index: Item ID

Library: MSL

Item tree defaults

☐ Item tree display collapsed ☒ Item tree display expanded

Extended Info Display Options

☒ Display staff note on item list

☒ Display public note on item list

OK Cancel

e. Click **OK**.

f. When you close WorkFlows, select **Yes** when prompted to save changes.

? Properties have been changed. Would you like to save changes?

Yes No

4. Open the **Delete Title, Call Numbers or Items** wizard (Cataloging module > Title Maintenance toolbar > Delete Title...).

5. Scan the item barcode.

6. Check the box(es) next to the item(s) / call number(s) you want to delete. This will **bold and italicize** them.

Delete Title, Call Numbers or Items x

Delete Title, Call Numbers or Items

Search for:: 2339494-153002

Index: Item ID

In this library: MSL

Current: [Thorne, Jack, author, cre... --- Harry Potter and the cursed child. Pa](#)

EXACT Item ID 2339494-153002, MSL: 1 This is item

Title	Author
Harry Potter and the cursed child. Parts one and two	Thorne, Jack, author,

Description Call Number/Item Holds

MSL 39918000069953 - 1 BOOK - JUV FICT

MSL

☒ FIC ROWL - MSL

☐ 2339494-153001 - 1 - 28DAY - STACKS

☒ 2339494-153002 - 2 - 28DAY - STACKS

☐ YA ROWL - MSL

☐ 2339494-154001 - 1 - 28DAY - STACKS

☐ 2339494-154002 - 2 - 28DAY - STACKS

7. Click **Delete** at the bottom of the screen.



The item will immediately be removed from the system and cannot be retrieved.

Video Tutorial

Discarding vs Deleting Records